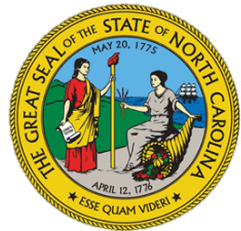


North Carolina Immunization Registry (NCIR)

Manage Inventory

User Guide

Last Updated: January 14, 2022



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**



Manage Inventory

Step 1 of 3: Navigate homepage

There are several inventory alerts that appear on the home page for the Administrator and Inventory Control Users. We are going to look at these alerts and then move on to how to manage your inventory. Keep in mind that any of these alerts can be changed to suit the individual practice by the administrator.

Audience

Inventory
Control

Administrator

ncir

Production Region 7.2.3

General
system user manual

Maintenance
manage users
manage sites
manage clinicians
manage schedules

Inventory
manage inventory
manage orders
manage transfers
shipping documents
request transaction sum
request vaccine usage
request wasted/expired
inventory report

Clients
manage client
enter new client

Immunizations
manage immunizations

home change password logout help desk

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

announcements:

- NEW 03/17/2008 ~ [How to Report Duplicate Clients](#)
- NEW 02/13/2008 ~ [Ordering Authority Announcement](#)
- NEW 02/06/2008 ~ [Reminder - Double Surnames](#)
- NEW 02/05/2008 ~ [Hib Recommendations](#)
- NEW 02/05/2008 ~ [Vaccine Doses administered outside of the United States](#)
- NEW 02/04/2008 ~ [Recording Tdap Immunizations](#)
- NEW 01/17/2008 ~ [Local Health Department Users](#)
- NEW 01/08/2008 ~ [Accepting Vaccine Orders](#)
- NEW 12/19/2007 ~ [Hib Announcement](#)

[more announcements](#)

release notes:

- NEW 02/01/2008 ~ [Release Version 7.2.3 NCIR Release Notes Version 7.2.3](#)

[more release notes](#)

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment
Order(s)	1	0
Transfer(s)	0	1

Active Inventory that is Going to Expire ...

Site Name	Trade Name	Lot Number	On Hand	Public	Exp Date
TEST ORGANIZATION	Adacel	a456123	43	N	05/27/2008
TEST ORGANIZATION	Flu-Mist	K12345	116	Y	06/30/2008
TEST ORGANIZATION	LYMErix	1234	492	Y	07/31/2008
Test Site 50	Adacel	a456123	1	N	05/27/2008
Test Site 50	Boostrix	boo111	1	Y	05/09/2008

Inventory that is Running Low by Vaccine Group ...

Vaccine Group	Quantity On Hand	Public
HPV	9	

Inventory that is Running Low by Trade Name ...

Trade Name	Quantity On Hand	Public
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This alert lets you know the status of orders and transfers that have been placed.

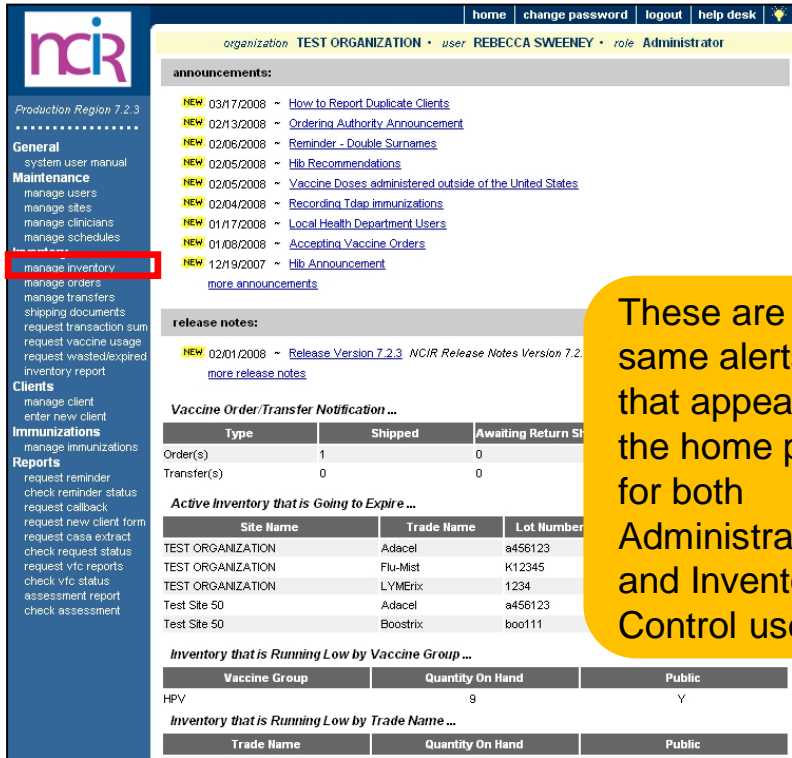
This alert lets you know if you have any active inventory that is going to expire. The default is set to 120 days.

This alert shows any inventory that is running low by the individual trade name. The default for this is set to 10 doses. Now, let's look at your inventory.

This alert shows any inventory that is running low by the vaccine group. The default for this is set to 10 doses.

Step 2 of 3: Navigate to Inventory

1. On the homepage, click **Manage Inventory**
2. On the Manage Inventory page, click **Show Inventory**



The screenshot shows the NCIR homepage. In the left sidebar, under the 'Reports' section, the 'manage inventory' link is highlighted with a red box. The main content area shows various announcements and release notes.

These are the same alerts that appear on the home page for both Administrators and Inventory Control users.

Manage Inventory

Show Inventory for Sites.... **Show Inventory**

Show Transactions for Sites.... Show Transactions

Update inventory Alerts.... Update Alert Prefs

Return to the Previous Screen.... Cancel

Inventory Alerts

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	2	0	0
Transfer(s)	1	0	0

Active Inventory that is Going to Expire ...

Site Name	Trade Name	Lot Number	On Hand	State	Exp Date
NORTH CAROLINA IMMUNIZATION REGISTRY	Acel-Imune	22525	7	Y	07/31/2008
NORTH CAROLINA IMMUNIZATION REGISTRY	Fluzone Pres-Free	654-654	10200	Y	06/30/2008
NORTH CAROLINA IMMUNIZATION REGISTRY	Gardasil	1234z	89	Y	05/05/2008
NORTH CAROLINA IMMUNIZATION REGISTRY	Tripedia	U1985CA	20	Y	08/06/2008

Inventory that is Running Low by Vaccine Group ...

Vaccine Group	Quantity On Hand	State
HPV	9	Y

No vaccine groups have a low inventory.

Inventory that is Running Low by Trade Name ...

Trade Name	Quantity On Hand	State
Menactra	7	Y

Audience

Inventory
Control

Administrator

Step 3 of 3: Manage Inventory

From this screen you can add inventory, modify quantity, and show transactions for your inventory

Manage Inventory

Add Inventory for Site (TEST ORGANIZATION)....

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

Site: TEST ORGANIZATION

Show ☒ Active ☐ Inactive ☐ Non-Expired ☐ Expired
☐ Public ☐ Private ☒ All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Da
<input type="checkbox"/>	ActHib	U1234AA	710	Y	Y	05/05/2009
<input type="checkbox"/>	Adacel	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	Adacel	ABC123	14	Y	N	01/01/2009
<input type="checkbox"/>	Boostrix	12351	4	Y	N	10/12/2010
<input type="checkbox"/>	Certiva	555	279	Y	N	01/31/2009
<input type="checkbox"/>	DECAVAC	05269	10	Y	N	08/28/2008
<input type="checkbox"/>	DECAVAC	AB44	20	Y	N	01/01/2009
<input type="checkbox"/>	DT	121252555	18	Y	N	05/20/2009
<input type="checkbox"/>	DTP	098898	19	Y	N	10/20/2009
<input type="checkbox"/>	Engerix-B Peds	1235N	8	Y	N	12/31/2009
<input type="checkbox"/>	Flu-Mist	K12345	116	Y	Y	06/30/2008

You can look at any combination of inventory in the NCIR by clicking on the radio button next to your selection. For example, if you want to see all your active, public vaccine click on the radio button next to **Active** and **State**.

Audience

Inventory Control

Administrator

Vaccine's that will expire in less than 120 days will be highlighted in pink.

Steps for Adding Private Inventory (Non-COVID-19 Vaccine)

Step 1 of 3: Navigate to Inventory

1. On the homepage, click **Manage Inventory**
2. Click **Show Inventory**
3. Click **Add Inventory**

Manage Inventory

Add Inventory for Site (TEST ORGANIZATION)....

Add Inventory

Modify Quantity On Hand for Selected Sites....

Modify Quantity

Show Transactions for Sites....

Show Transactions

Return to the Previous Screen....

Cancel

Site: TEST ORGANIZATION

Show ☒ Active ☐ Inactive ☐ Non-Expired ☐ Expired
☐ Public ☐ Private ☐ All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input checked="" type="checkbox"/>	ActHib	U1234AA	710	Y	Y	05/05/2009
<input type="checkbox"/>	Adacel	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	Adacel	ABC123	14	Y	N	01/01/2009
<input type="checkbox"/>	Boostrix	12351	4	Y	N	10/12/2010
<input type="checkbox"/>	Certiva	555	279	Y	N	01/31/2009

Audience

Inventory
Control

Administrator

Step 2 of 3: Complete Inventory Information

1. Choose the **Trade Name**, the Manufacturer will automatically populate
 2. Enter the **NDC** (noted on the outside of the vaccine box)
 3. Enter the **Lot Number** (use the number on the vaccine box, NOT the vial)
 4. Verify the **Dose** size from the drop-down menu
 5. Verify the **Units** (will always be mL unless you are administering a vaccine in capsule form)
- NOTE: Tubes are not considered capsules

Audience

Inventory
Control

Administrator

Add Vaccine Inventory Information

Site: Forks Primary Care

* Trade Name: Adacel ☒

* Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught; Con ☐

* NDC: 49281-0400-10;Single Dose Vials; 10-PACK; 0.5 mL

* Lot Number: VAX456 * Presentation : Vial

* Dose : .5

* Units : mL

* Expiration Date: 02/05/2020

* Funding Program: Private

* Lot Active: Yes

* Quantity on Hand: 30

Cost Per Dose (\$): 17.65

Save Cancel

Step 2 of 3: Complete Inventory Information

6. Enter the **Expiration Date**. **NOTE:** Vaccines with only a month and year should be entered as the last day of the month of expiration
7. Verify the **Funding Program** (should always be **Private**)
8. Lot Active drop-down must be set to **Yes** to be saved. (**Yes** will make the Lot number appear in the drop-down menu under the Lot Number/Trade Name when documenting administration of a dose of vaccine. If you do not want the lot number to appear in the drop-down menu, change the active indicator to **No** after saving the initial information)
9. Enter the **Quantity on Hand** (the number of doses, not boxes or vials)
10. Cost Per Dose is **optional**

Audience

Inventory
Control

Administrator

Add Vaccine Inventory Information

Site: Forks Primary Care

* Trade Name: Adacel ☒

* Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught; Con ☐

* NDC: 49281-0400-10;Single Dose Vials; 10-PACK; 0.5 mL

* Lot Number: VAX456 * Presentation: Vial

* Dose: .5

* Units: mL

* Expiration Date: 02/05/2020

* Funding Program: Private

* Lot Active: Yes

* Quantity on Hand: 30

Cost Per Dose (\$): 17.65

Save Cancel

Step 3 of 3: Save

Once complete, click **Save**

Add Vaccine Inventory Information

Site: Forks Primary Care

Save

Cancel

* Trade Name:

Adacel

* Manufacturer:

Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught, Con

* NDC:

49281-0400-10;Single Dose Vials; 10-PACK; 0.5 mL

* Lot Number:

VAX456

* Presentation :

Vial

* Dose :

.5

* Units :

mL

* Expiration Date:

02/05/2020

* Funding Program:

Private

* Lot Active:

Yes

* Quantity on Hand:

30

Cost Per Dose (\$):

17.65

Audience

- Inventory Control
- Administrator

Steps for Modifying Quantity

Step 1 of 2: Modify Quantity (Option 1)

1. Click in the box next to the **Trade Name** in blue until the green check appears
2. Click **Modify Quantity**

Manage Inventory

Add Inventory for Site (TEST ORGANIZATION)....

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

Site:

Show ☒ Active ☐ Inactive ☐ Non-Expired ☐ Expired
☐ Public ☐ Private ☐ All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input checked="" type="checkbox"/>	ActHib	U1234AA	710	Y	Y	05/05/2009
<input type="checkbox"/>	Adacel	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	Adacel	ABC123	14	Y	N	01/01/2009
<input type="checkbox"/>	Boostrix	12351	4	Y	N	10/12/2010
<input type="checkbox"/>	Certiva	555	279	Y	N	01/31/2009

Audience

Inventory
Control

Administrator

Step 2 of 2: Modify Quantity (Option 1)

- 1. Choose the **Action** from the drop-down box. Either **Add** or **Subtract**.
- 2. Enter the **Amount** in doses that is being modified.
- 3. Choose the reason under the **Category** drop down box. See the next slide for an explanation of each transaction.

Manage Inventory

Save Changes to Quantity On Hand for Selected Sites....

Save

Return to the Previous Screen....

Cancel

Modify Quantity On Hand for Selected Site(s)

Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
ActHib	U1234AA	710	Add ▾		Receipt from Inventory ▾

NOTE: Fields marked with an asterisk * are required.

Audience

Inventory Control

Administrator

This screen will allow you to modify the quantity of as many vaccines as you choose on the previous screen. It is good to use this option if you have several lot numbers to edit.

Reasons to Modify Quantity (1 of 2)

- 1. **Receipt from Inventory:** Select this option to add private inventory received from manufacturer with the same trade name, lot number, funding source and expiration date.
- 2. **Receipt from Provider:** Select this option to add inventory received from a provider with the same trade name, lot number, funding source and expiration date. This is intended for doses returned from providers not in NCIR. For providers in NCIR, use the manage transfer screen to track inventory shipments.
- 3. **Return to Provider:** Select this option to add doses are being returned to you from another organization or an external site after your inventory transfer was returned. This is intended for doses returned from providers not in NCIR. For providers in NCIR, use the manage transfer screen to track inventory shipments.

Audience

Inventory Control

Administrator

Manage Inventory

Save Changes to Quantity On Hand for Selected Sites....

Save

Return to the Previous Screen....

Cancel

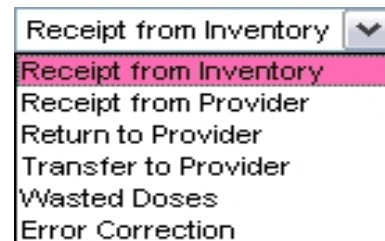
Modify Quantity On Hand for Selected Site(s)

Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
ActHib	U1234AA	710	Add		<div>Receipt from Inventory</div> <div>Receipt from Inventory</div> <div>Receipt from Provider</div> <div>Return to Provider</div> <div>Transfer to Provider</div> <div>Wasted Doses</div> <div>Error Correction</div>

NOTE: Fields marked with an asterisk * are required.

Reasons to Modify Quantity (2 of 2)

4. **Transfer to Provider:** Select this option if you are transferring doses out of your inventory to an external site.
5. **Wasted Doses:** Select this option if there was any vaccine waste for a particular lot. When you select the Wasted Doses category, you will be required to enter the following:
 - 'Reason': Reason that the doses are marked as wasted
 - *Example:* Tray left out overnight. (verified non-viable with Immunization Branch
 - 'Preventive Action': Action taken to prevent further wastage
 - *Example:* Return vaccine tray to refrigerator immediately after drawing vaccine
6. **Error Correction:** Select this option if you have made any errors in entry to your private stock of vaccine. For example, you entered 100 instead of 10 for the quantity. You will also be required to enter a reason for error correcting. **Before you error correct any state supplied vaccines, you should call the NC Help Desk, 1-877-873-6247, so that you may be guided in how to find errors before changing quantities in vaccine lots.



Audience

Inventory
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Fixing Errors

- You can modify your private inventory discrepancies on your own.
- Issues with state supplied inventory need to be Error Corrected.

The screenshot shows the mciR system interface. The top navigation bar includes links for home, change password, logout, and help desk. The user is logged in as Ashley Graham, Administrator, for the organization TEST ORGANIZATION. The main section is titled 'Manage Inventory' and contains two buttons: 'Save Changes to Quantity On Hand for Selected Sites....' and 'Return to the Previous Screen....'. Below this is a table for 'Modify Quantity On Hand for Selected Site(s)'. The table has columns for Trade Name, Lot Number, Inv On Hand, Action, *Amount, and Category. A row is shown with Trade Name 'ActHib', Lot Number 'abc123ab', and Inv On Hand '554'. The Action is 'Subtract', the Amount is '2', and the Category is 'Error Correction'. A yellow arrow points to the '* Error Reason:' field, which is required for this category. A note at the bottom states: 'NOTE: Fields marked with an asterisk * are required.'

Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
ActHib	abc123ab	554	Subtract	2	Error Correction

* Error Reason:

NOTE: Fields marked with an asterisk * are required.

Audience

Inventory Control

Administrator

When a State-Supplied lot quantity is modified using the Category “Error Correction,” an **Error Reason** must be entered.

Error Correction

When to Use Error Correction

- Use this category when adding to or subtracting from inventory doses that were keyed or documented incorrectly
 - i.e. if 100 is entered instead of 10

When NOT to Use Error Correction

- If inventory is expired
- If a storage and handling issue caused the dose to be unusable
- If the vaccine is pre-drawn and not used

Audience

Inventory
Control

Administrator

Avoid Documentation Errors

- Enter all immunizations administered into the NCIR as soon as possible
- Only enter immunizations administered by you, under your username
- Document all doses that have been administered, transferred, wasted and/or expired in the NCIR

In Summary

- Error Correction should be used infrequently
- Use best practices to maintain vaccine inventory correctly in the NCIR
- If you are unable to reconcile your inventory error correction should be your last option

Audience

Inventory
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Step 1 of 3: Modify Quantity (Option 2)

The other way that you can modify a quantity of a vaccine in your inventory is to go through the Trade Name link.

1. Start by finding the Trade Name for the vaccine you want to edit.

Audience

Inventory
Control

Administrator

Manage Inventory

Add Inventory for Site (TEST ORGANIZATION)....

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

Site:
Show ☒ Active ☐ Inactive ☐ Non-Expired ☐ Expired
☐ State ☐ Private ☐ All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input type="checkbox"/>	ActHib	U1234AA	700	Y	Y	05/05/2009
<input type="checkbox"/>	Adacel	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	Certiva	555	279	Y	N	01/31/2009
<input type="checkbox"/>	DECAVAC	12345	10	Y	N	08/28/2008
<input type="checkbox"/>	DECAVAC	AB44	20	Y	N	01/01/2009
<input type="checkbox"/>	DI	121252555	18	Y	N	05/20/2009
<input type="checkbox"/>	DTP	098898	19	Y	N	10/20/2009
<input type="checkbox"/>	Engerix-B Peds	1235N	8	Y	N	12/31/2009
<input type="checkbox"/>	Flu-Mist	K12345	116	Y	Y	06/30/2008

Click the Trade Name in blue

Step 2 of 3: Modify Quantity (Option 2)

1. Choose **Add** or **Subtract** from Inventory.
2. Enter the **Amount** in doses.
3. Choose the reason from the **Category** drop down box.
4. Click **Save** when finished.

Edit Vaccine Inventory Information

Site: TEST ORGANIZATION

*Trade Name: DECAVAC

▼

⊕

*Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught, Conn

▼

⊖

Lot Number: AB44

*Dose: .5

▼

*Units: mL

▼

*Expiration Date: 01/01/2009

📅

*Funding Program: Private

▼

*Lot Active: Yes

▼

Quantity on Hand: 20

Cost Per Dose (\$):

Save

Cancel

Add New

Delete

Modify Quantity On Hand

Action: Add

▼

Amount:

Category: Receipt from Inventory

▼

NOTE: Fields marked with an asterisk * are required.

Audience

Inventory
Control

Administrator

Step 3 of 3: View Confirmation or Cancel (Option 2)

Edit Vaccine Inventory Information

Site: TEST ORGANIZATION

*Trade Name: DECAVAC

*Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur M)

*Lot Number: AB44

*Dose: .5

*Units: mL

*Expiration Date: 01/01/2009

*Funding Program: Private

*Lot Active: Yes

Quantity on Hand: 19

Cost Per Dose (\$):

Save

Cancel

Add New

Click **Cancel** to return to the view inventory screen

Modify Quantity On Hand

Action: Add

Amount:

Category: Receipt from Inventory

inventory was updated successfully.

NOTE: Fields marked with an asterisk * are required.

If you have modified the inventory correctly you will see this message.

Audience

Inventory
Control

Administrator

Steps to Run a Transaction Report

Step 1 of 2: Navigate to Transactions

- 1. From the home page, click **Manage Inventory**.
- 2. Click **Show Inventory**.
- 3. Click **Show Transactions**.

Audience

Inventory Control

Administrator

Manage Inventory

Add Inventory for Site (TEST ORGANIZATION)....

Add Inventory

Modify Quantity On Hand for Selected Sites....

Modify Quantity

Show Transactions for Sites....

Show Transactions

Return to the Previous Screen....

Cancel

Site:

Show ☒ Active ☐ Inactive ☐ Non-Expired ☐ Expired
☐ State ☐ Private ☐ All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input type="checkbox"/>	ActHib	U1234AA	700	Y	Y	05/05/2009
<input type="checkbox"/>	Adacel	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	Adacel	ABC123	14	Y	N	01/01/2009

Step 2 of 2: Select Specifications for Transaction Report

1. Enter the **To** and **From dates** for the transaction needed.
2. You can also choose the **To** and **From dates** for the date that an actual shot was given.
3. You can choose one user-name or all user-names.
4. You can choose the **Transaction Type** or look at them all
5. If your organization has more than one **site** established, you can look at the transactions for one site or for them all.
6. You can choose the **Trade Name** or look at them all.
7. You can choose **how many records** you want to see.

Audience

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organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

Vaccine Transactions for: TEST ORGANIZATION

*Date Entered [From]: 03/01/2008 *To: 04/01/2008

*Date shot was given [From]: *To:

User Name: All User Names

Transaction Type: All Transaction Types

Site Name: All Sites with Inventory

Trade Name/Lot Number: All Lot Numbers

Display Last 200 Records

View

Cancel

*NOTE: Fields marked with an asterisk * are required.*

Transaction Report

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

To print landscape, select File, Page Setup, and
under Orientation select the Landscape option.

Print

Cancel

Vaccine Transactions for Organization: TEST ORGANIZATION

Record Count: 117

Site Name	Date Given	Trans Date	Lot \ Trade Name	Type	Qty	Client Name	DOB	User Name
TEST ORGANIZATION		03/03/2008	98778 \ Prevna	REC	500			Caroline Helton
TEST ORGANIZATION		03/03/2008	321321321 \ ROTATEQ	REC	500			Caroline Helton
TEST ORGANIZATION	04/01/2008	04/01/2008	555 \ Certiva	Immunize	-1	LARSEN, ERIC	06/06/2005	Lisa Erickson
TEST ORGANIZATION	03/31/2008	03/31/2008	555 \ Certiva	Immunize	-1	LARSEN, ERIC	06/06/2005	Lisa Erickson
TEST ORGANIZATION		03/31/2008	FLU234 \ Flu-Mist	Immunize	-1	LARSON, ERIC	02/15/1987	Jason Suchon
TEST ORGANIZATION	03/31/2008	03/31/2008	9897654 \ Td-MassBioLab	Immunize	-1	LARSEN, ERIC	06/06/2005	Jason Suchon
TEST ORGANIZATION		03/31/2008	98778 \ Prevna	Immunize	-1	LARSON, ERIC	02/15/1987	Jason Suchon
TEST ORGANIZATION		03/31/2008	98778 \ Prevna	Delete	1	LARSON, ERIC	02/15/1987	Jason Suchon
TEST ORGANIZATION		03/31/2008	FLU234 \ Flu-Mist	Delete	1	LARSON, ERIC	02/15/1987	Jason Suchon
TEST ORGANIZATION	03/31/2008	03/31/2008	FLU234 \ Flu-Mist	Immunize	-1	LARSEN, ERIC	06/06/2005	Jason Suchon
TEST ORGANIZATION		03/31/2008	UA13245 \ Tripedia	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION	03/31/2008	03/31/2008	AHAVB163AB \ Havrix-Peds 2 Dose	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION	03/31/2008	03/31/2008	GRD234 \ Gardasil	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION		03/31/2008	ABC234 \ Pediarix	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION	03/31/2008	03/31/2008	U1234AA \ ActHib	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION		03/31/2008	UA13245 \ Tripedia	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION	03/31/2008	03/31/2008	Z-2341 \ IPOL	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION		03/31/2008	ABC234 \ Pediarix	Delete	1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb

Audience

Inventory
Control

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Transaction Codes

Code	Meaning
REC	Receipt from Inventory
RECS	Receipt from State
RECT	Receipt from Provider
Immunize	Immunizations Given
Delete	Immunizations Deleted
TRA	Transfer to Provider
TRAX	Transfer to State: Expired
TRAV	Transfer to State: Viable
WAS	Wasted Doses
RET	Return to Provider
RETV	Return to State: Viable
RETX	Return to State: Expired
ERR	Error Correction
EXPR	Remove- Expired Private
EXPU	Remove- Expired State

Audience

Inventory
Control

Administrator

Steps to Run an Inventory Reconciliation Report

Step 1 of 3: Navigate to Inventory Report

An inventory reconciliation report will show you what the NCIR says you have in your inventory and give you room to write your actual count from your refrigerator so that you can begin to balance your inventory.

1. From the homepage, click **Inventory Report**.

The screenshot shows the NCIR homepage. The left sidebar contains a navigation menu with the following sections: General (system user manual), Maintenance (manage users, manage sites, manage clinicians, manage schedules), Inventory (manage inventory, manage orders, manage transfers, shipping documents, request transaction summary, request vaccine usage, request master/expired inventory report - highlighted with a red box), Clients (manage client, enter new client), Immunizations (manage immunizations), and Reports (request reminder, check reminder status, request callback, request new client form, request casa extract). The main content area is titled 'organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator'. It features an 'announcements:' section with a list of recent updates, each starting with 'NEW' and a date, followed by a link to the announcement. The announcements include 'Transfer of Expired Vaccine', 'New Immunization Requirements', 'Delayed Transfers from Vaccine Distribution', 'Accepting Vaccine Orders', 'NCIR eligibility status and NCIR upgrade', 'Reminder Recall/Assessment/CASA extract', 'HPV Vaccine', 'Update on One-Way Real Time Data Exchange', 'How to Report Duplicate Clients', 'Ordering Authority Announcement', 'Reminder - Double Surnames', 'Hib Recommendations', 'Vaccine Doses administered outside of the United States', 'Recording Tdap immunizations', 'Local Health Department Users', and 'Hib Announcement'. A 'more announcements' link is provided. Below the announcements is a 'release notes:' section with a 'NEW' entry for 'Release Version 7.4.0 NCIR Release Notes Version 7.4.0' and a 'more release notes' link. The bottom of the page shows the start of a 'Vaccine Order/Transfer Notification' section.

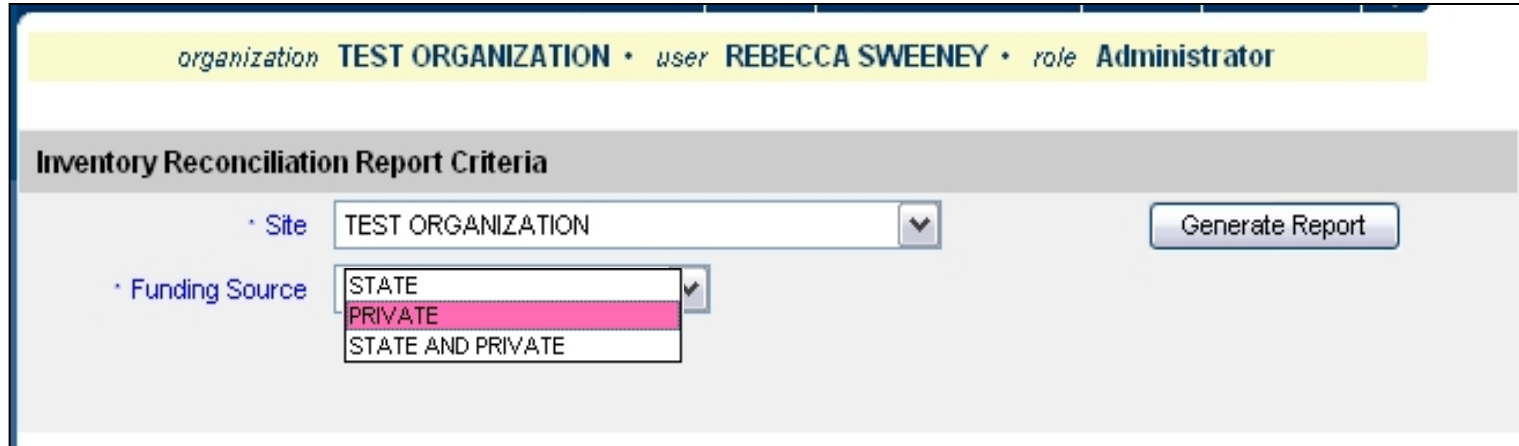
Audience

Inventory
Control

Administrator

Step 2 of 3: Select Criteria

1. Choose your **Site**.
2. Choose your **Funding Source**.
3. Click **Generate Report** when finished.



The screenshot shows a web interface for the 'Inventory Reconciliation Report Criteria'. At the top, a yellow banner displays the user context: 'organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator'. Below this, the form has a title bar 'Inventory Reconciliation Report Criteria'. It contains two dropdown menus: 'Site' with 'TEST ORGANIZATION' selected, and 'Funding Source' with a dropdown menu open showing 'STATE', 'PRIVATE' (highlighted in pink), and 'STATE AND PRIVATE'. A 'Generate Report' button is located to the right of the 'Site' dropdown.

- Once you click on Inventory Report, you have the choice of what you want to appear in the report itself.
- Make sure that if your organization has multiple sites that you have the correct site selected or you can run the report for all the sites in a single organization.
- You can run the report for all private, all state supplied or both.
- These options give you a wider variety of ways to keep your inventory balanced.

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Step 3 of 3: Generate Report

Report Date: 07/01/2008

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Inventory Reconciliation Report / Worksheet

TEST ORGANIZATION

Funding Source	Vaccine Group	Trade Name	Lot Number	Expiration Date	NCIR Reported Doses On Hand	Actual Count of Doses On Hand
Private	Anthrax	Anthrax	FDD70019 Private	01/01/2010	98	
Private	DTP/aP	Certiva	555	01/31/2009	274	
Private	DTP/aP	DT	121252555	05/20/2009	18	
Private	DTP/aP	DTP	098898	10/20/2009	19	
Private	DTP/aP	Pediarix	ABC234	01/01/2010		
Private	DTP/aP	Pediarix	UA2345	01/01/2010		
Private	HepA	Havrix-Adult	8585	01/01/2010		
State	HepB	Recombivax-Adult	REC234	01/01/2010		
State	Hib	ActHib	U12345	01/01/2010		
State	Hib	PedvaxHIB	02590	01/01/2010		
State	Influenza	Flu-Mist	FLU234	01/01/2009		

NCIR Reported Doses On Hand shows the doses that the NCIR reports that you have in your inventory.

Actual Count of Doses on Hand gives you room to count out your vaccine in your fridge and then write the actual amount here in this column

Audience

Inventory Control

Administrator

Once you have counted the actual vaccine in your fridge and you compare it to what the NCIR says you have on hand, both columns should match. If they do not you need to run down the list of possible inventory discrepancies. (see next slide)

Possible NCIR Inventory Discrepancies

Initial Inventory:

- Initially mis-keying inventory into the NCIR
- Giving immunizations after physical count is completed and before going live with the NCIR

Keying Errors:

- Doses keyed as historical (which does not subtract from your inventory) instead of doses keyed as new immunization given (which *does* subtract from your inventory)
- Trouble with data entry of combination drugs (i.e. Pediarix)
- Certain nurses not entering all the shots that were administered
- Clicking the back button when administering shots (which creates a double entry of those shots)
- Picking the wrong site from the site drop down box or not changing the site when entering shots from inventory
- Mixing up State and Private vaccine doses
- Clicking the “Remove” button when entering doses from inventory
- Not entering the data in a timely manner
- Reporting on Vaccine Administered Logs and not in the NCIR
- Server problems at the provider’s office- not able to key immunizations or place an order

Managing Orders, Transfers, Wastage:

- Calling to place a vaccine order after going live with the NCIR instead of placing your order through the NCIR
- Manually entering inventory instead of accepting transfers prior to it being mandatory to accept transfers from the state
- Not reporting wastage
- Not reporting transfers

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Control

Administrator

Steps to Run a Vaccine Usage Report

Step 1 of 3: Navigate to Vaccine Usage

A Vaccine Usage Report is going to give you a break down of the total number of vaccines used per Trade Name and Age Group.

1. Start by clicking **request vaccine usage**.

Audience

Inventory
Control

Administrator

The screenshot displays the NCIR web application interface. The top navigation bar includes links for home, change password, logout, and help desk. Below this, the user's organization is listed as TEST ORGANIZATION, the user as REBECCA SWEENEY, and the role as Administrator. The main content area is divided into two sections: announcements and release notes. The announcements section lists various updates and links, including 'Transfer of Expired Vaccine', 'New Immunization Requirements', 'Delayed Transfers from Vaccine Distribution', 'Accepting Vaccine Orders', 'NCIR eligibility status and NCIR upgrade', 'Reminder Recall/Assessment/CASA extract', 'HPV Vaccine', 'Update on One-Way Real Time Data Exchange', 'How to Report Duplicate Clients', 'Ordering Authority Announcement', 'Reminder - Double Surnames', 'Hib Recommendations', 'Vaccine Doses administered outside of the United States', 'Recording Tdap immunizations', 'Local Health Department Users', and 'Hib Announcement'. The release notes section lists 'Release Version 7.4.0 NCIR Release Notes Version 7.4.0'. The sidebar on the left contains navigation links for Production Region 7.4.0, General (system user manual), Maintenance (manage users, manage sites, manage clinicians, manage schedules), Inventory (manage inventory, manage orders, manage transfers, shipping documents), Clients (manage client, enter new client), Immunizations (manage immunizations), and Reports (request reminder, check reminder status, request callback, request new client form, request casa extract). The 'request vaccine usage' link in the Inventory section is highlighted with a red box.

Step 2 of 3: Select Criteria

- 1.Choose your **Site** from the site drop down box. If you have more than one site you can choose, however, if there is only one site associated with your organization the box will default to your site.
- 2. Choose your **From** and **To** dates for when you want the report to show.
- 3. Click **Generate** when you are ready to run the report. When you click this, you will notice that a status update will appear under the report screen.
- 4. Your status will read **Queue** and you will need to click **Refresh**. This refresh button will update your status
- 5. When your report is ready to view the status will read **100%** and the report name will be displayed in blue. Just click on the report name and you can view the vaccine usage report.

Audience

Inventory Control

Administrator

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

Vaccine Usage Report Criteria

Site(s) TEST ORGANIZATION

Report Date Range:
From 04/01/2008 To 05/01/2008

NOTE: Fields marked with an asterisk * are required.

Generate Report

Vaccine Usage Request Status

Report Name	Status	Target From	Target To	
Vaccine Usage Report	QUEUE	04/01/2008	05/01/2008	<div>Refresh</div> <div>Cancel</div>

Vaccine Usage Request Status

Report Name	Status	Target From	Target To	
Site: TEST ORGANIZATION	100 %	04/01/2008	05/01/2008	<div>Refresh</div> <div>Cancel</div>

Step 3 of 3: Generate Report

Vaccine Usage Report
Vaccination Period: 04/01/2008 to 05/01/2008

Page 1 of 1

Site Name: TEST ORGANIZATION

Shows age categories for clients

Group Name	Trade Name	Funding	<1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Totals
DTP/aP	Certiva	PRIVATE			1						1				2
HepA	Havrix-Peds 2 Dose	STATE						1							1
HepA - HepB	Twinrix	STATE									1				1
Influenza	Flu-Mist	STATE		1											1
Totals:				1	1			1			2				5
Client Counts:				1	1			1			1				4

Total number of doses per age group

Total number of clients served

Complete total for trade name

Audience

Inventory Control

Administrator

Where to Go for More Help?



Questions?

Contact your Regional Immunization Program Consultant (RIC)

The RIC Coverage Map with contact information is located on the Immunization Branch website:

<https://www.immunize.nc.gov/contacts.htm>

NC Vaccines Help Desk

1-877-873-6247

(Monday – Friday 7:00 AM – 7:00 PM ET and Saturday 8:00 AM – 4:00 PM ET)

https://ncgov.servicenowservices.com/csm_vaccine?id=immunizations&sys_id=69f035b11b037c9099510f6fe54bcbee

Appendix

NCIR Roles

NCIR Role	Role Definition	Corollary Role in CVMS
Reports Only	This person in NCIR is only able to search for clients and view/print client specific records.	N/A
Typical User	Person who can manage, including add and edit, clients in NCIR, as well as manage inventory and ordering. This role also has all of the functionality of the Reports Only role.	Healthcare Provider
Inventory Control	Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.	N/A
Administrator	Person who can manage organization users, sites, and clinicians in NCIR. They run practice-level reports, including reminder/recall. This role also has all of the functionality of the Reports Only, Typical User, and Inventory Control roles.	Location Manager